

EVALUATION OF SMALL GRANTS SCHEMES (UKRAINE FUND) TERMS OF REFERENCE

1. Introduction/Background

Fondation Suisse de la Chaîne du Bonheur (Swiss Solidarity), created 80 years ago and based in Geneva, Switzerland, launches fundraising campaigns for the victims of major humanitarian crises, in partnership with the Swiss Broadcasting Corporation (SSR/SRG) and private media. With the funds raised, Swiss Solidarity (SwS) supports relief projects in Switzerland and abroad. Since the large-scale Russian invasion of Ukraine in February 2022, Ukraine is one of SwS key area of intervention.

As part of its response, Swiss Solidarity has financed over 113 projects in Ukraine and neighbouring countries across multiple sectors, offering cash assistance, livelihoods, shelter, rehabilitation of schools and water networks and, among others, protection, education and mental health and psychosocial support. The portfolio also includes small grant schemes with varying modalities, objectives, grant sizes and capacity-strengthening support.

2. Objectives

The evaluation has mainly a learning purpose. Its objective is to generate learning on the effectiveness of small grant schemes in addressing both priority needs and delivering community benefits through locally-led programming. It will assess the relevance, effectiveness and efficiency of three different small grant schemes supported in order to gather insights on what models and approaches work best in contexts like Ukraine, and draw practical lessons and recommendations to guide the future support, design, and implementation of small grant schemes in Ukraine (and beyond) for Swiss Solidarity and partners.

3. Scope

The evaluation will review one ongoing and two recently completed projects that consist of small grant schemes or include a small grants component:

| SwS Reference | Organisation | Title | Oblasts | Approx. nr of small grants & Average grant size | Project Duration and overall project amount |
|---------------|------------------------|---|----------------|---|---|
| 333.017 | Helvetas | Sylna Hromada | Kyiv / Kharkiv | 20 (CHF 12'000.-) | 01.02.25 – 31.01.26 CHF 1'602'436.- |
| 336.036 | HEKS/ EPER | Strengthening community resilience through a survivor and community-led response (sclr) | Kharkiv | 47 (CHF 4'000.-) | 01.08.25 – 31.01.26 CHF 299'000.- |
| UKR22.25.004 | East Europe Foundation | Locally Driven Reconstruction and Recovery in Sumy Communities (Capable and Resistant Sumy) | Sumy | 12 (EUR 33'000.-) | 01.10.25 – 30.09.26) EUR 600'000.- |

4. Questions

The following questions should be assessed:

Relevance

- To what extent did the different grant scheme modalities and grantee type allow for responses to clearly identified local needs and priorities of affected communities? What elements proved to be essential for this?
- Were the grantee selection criteria (community initiatives, local NGOs, informal groups) and grant sizes appropriate for the intended outcomes and local context? Did the schemes fill a meaningful gap?
- How did the schemes help foster accountability to affected people (e.g. through participation in the selection committee, leadership in identifying needs, designing and implementing their response, transparent communication, feedback and complaint response mechanisms, etc.)?
- How relevant is/was the role of the capacity-strengthening activities (when part of the project) to the grantees' needs, existing capacity levels and requests? What types of capacity-strengthening and sharing activities proved most relevant?
- To what extent were the small grant scheme modalities appropriate to the security and operational context, and how did security constraints and duty of care considerations influence their implementation, monitoring approaches, and accessibility?

Effectiveness

- To what extent did the small grant schemes achieve tangible results (e.g. in terms of infrastructure or services) that effectively addressed priority needs? What value, if any, did the adoption of a sectoral approach bring to the effectiveness and quality of these results?
- To what extent did the small grant schemes contribute to broader and less direct benefits for communities, such as improved social cohesion, self-reliance and recovery? To what extent are community engagement mechanisms likely to continue beyond the project period?
- How satisfied are/were grantees and local communities with their level of involvement and influence in shaping the response? Do/did they feel that expectations on their time, effort, and support were realistic and reasonable?
- To what extent do/did grant schemes such as those implemented support and strengthen locally-led decision-making and crisis response capacity? How important is/was the role of the SwS partner organisation for enabling the results? Which roles and responsibilities of different staff and actors were particularly important in this regard?
- Were access, selection, and participation processes inclusive and equitable, particularly regarding integration of gender equality, non-discrimination and marginalised groups?
- What factors determined success and what practical lessons can inform future small grant projects and guidance (e.g. with regards to monitoring, grant size, risk management, capacity-strengthening etc.)?
- Which types of models or approaches appear most effective under what type of conditions in Ukraine (and beyond)? And from what grant size or complexity does a minimal organisational structure seem necessary for sound project management?

Efficiency

- Were grant sizes and timelines sufficient and appropriate for achieving the expected results, also considering the administrative demands?
- To what extent did the small grants delivery modality and costs of running the small grants project (e.g. follow-up costs of the grant-providing organisation(s), staff time) represent an efficient use of resources when considering both its direct results (infrastructure/services delivered) and its community benefits? Did the administrative procedures strike an appropriate balance between accountability and burden? Did the SwS partner provide enough information and guidance on reporting and management expectations?



5. Methodology

Some projects have planned their own internal after-action reviews and project-specific evaluations. The evaluators will be expected to coordinate with the concerned organisations to build on these evaluations and find complementary approaches rather than replicating what is/was already assessed. It is expected that the evaluation will employ a mixed-methods approach combining qualitative in-depth inquiry with selective comparative analysis. Given the different nature of the small grant schemes under evaluation which vary in average grant size, target groups, sectoral focus, implementation modalities, and types of support, the evaluation will have to employ a differentiated analytical approach when conducting comparative analysis and drawing conclusions across projects.

Document and desk review

- Review of project documentation (funding application consisting of a narrative, a logical framework and a budget; interim and final reports; SOPs and protocols etc.)
- Desk review of existing literature and reports and available evaluations.

Project visits and primary data-collection

- Project visits: it is expected that project visits are conducted. In case that no project visits are planned, it is up to the evaluation team to justify this decision and outline how they plan to ensure that key informant interviews with project staff, grantees and other relevant actors will be undertaken.
- Semi-structured interviews/FGDs with affected people, grantees, project staff, and other relevant stakeholders. The evaluators will be expected to propose a sample size and sampling strategy in the inception report.

Data Analysis

- Analysis of primary quantitative (costs, timelines etc.) and qualitative data as well as secondary data.
- The evaluation should ensure triangulation of findings using multiple data sources and perspectives, including project staff, grantees, beneficiaries, community representatives, and secondary documentation/data.

It is the duty of the evaluators to propose and to justify a methodology and a sequence of activities in the bidding document. The evaluation team is then expected to present a more detailed methodology in the inception report.

6. Expected deliverables

The selected contractor will be expected to submit the following documents in English (and Ukrainian when specified):

- 1) Inception report
The inception report should include the list of small grants projects to be evaluated, a description of the technical approach and proposed methodology (incl. tools & technology for data collection to be used, sampling method, etc.), an evaluation matrix setting out the subsidiary evaluation questions; the criteria used for assessing the questions; the planned sources for the necessary data and the data-collection methods used, the workplan and timeline; the risks inherent in the proposed methodology, ethical considerations, the broader risks that the evaluation may face, as well as the planned structure of the final report.
- 2) A 1-page briefing document in English and Ukrainian
This 1-pager should outline the purpose, timing and key messages to explain the evaluation process to stakeholders. This acts as a communication tool internally within the evaluation particularly during the data collection phase.
- 3) Final report (max. 25 pages) in English



- a. This report will be confidential and only accessible to Swiss Solidarity and the organisations having participated in the evaluation.
 - b. The final report should include an executive summary drafted in accessible language.
 - c. The report should include findings, conclusions, and a list of recommendations.
 - d. Separate annexes per organization (max 2 pages) for project-specific findings/recommendations.
- 4) Online presentation of max 1 h to Swiss Solidarity and participating organisations to discuss the findings, recommendations, and provide space for feedback and questions. This workshop may take place before or after submission of the draft final report, depending on the process.
 - 5) Short external anonymised report (max. 2-3 pages, summarizing the findings) or visual communication product in English and Ukrainian that presents the key messages and recommendations of the evaluation for publication on the website of Swiss Solidarity.

7. Ethical considerations

Independence & impartiality

- Evaluators must adhere to international best practice and standards in evaluation and maintain independence from program management. Evaluators cannot have participated in project design or implementation and must disclose any potential or perceived conflicts of interest in writing before engagement.

Confidentiality & data protection.

- Evaluators must protect respondent confidentiality, obtain informed consent, and comply with relevant data protection regulations. Individual responses will not be attributed without explicit consent. The (planned) use of AI or other tools needs to be clearly stated in the inception report and the evaluation report.

Respect & do no harm.

- Evaluation activities and methods used must be culturally and age appropriate. Evaluators will take steps to ensure participation does not create burden, risk, or expectation of benefit among respondents.

Representation & transparency.

- The evaluation must capture and reflect perspectives of key stakeholders, incl. affected people and communities. The methodology shall ensure that the different actors can express their views openly, considering potential barriers such as power imbalances, funding dependencies, gender, or social norms. The report shall indicate whose views inform specific findings and specify divergent perspectives across groups and underlying assumptions/expectations.

8. Timeline

| Description | Deadline |
|----------------------------------|-----------------------|
| Publication of call for interest | May 2026 |
| Deadline for submissions | May 2026 |
| Recruitment of the contractor | June 2026 |
| Inception phase | June/July 2026 |
| Data-collection and analysis | July/August 2026 |
| Draft final report | August 2026 |
| Online presentation | August/September 2026 |
| Finalised final report | September 2026 |
| Short external anonymised report | September 2026 |



9. Insurance and security management

The contractor is responsible for its own insurance coverage and security management.

10. Assessment criteria

Offers will be evaluated using the following assessment criteria:

| Aspect | Criteria | Points |
|--------------------------|--|--------|
| Context knowledge | The contractor has a thorough understanding of the Ukrainian context and its civil society and experience of working in this context | 10 |
| Access & Risk Management | The contractor has a presence in Ukraine | 10 |
| | The contractor has suitable policies and systems in managing risks and is willing to access high-risk environments | 10 |
| Technical expertise | Experience with small grant schemes | 10 |
| | Experience and expertise in undertaking evaluations | 20 |
| Language skills | The lead contractor has excellent writing skills in English | 5 |
| | The contractor has excellent command of Ukrainian | 5 |
| Methodology | The proposed methodology and tools are fit for the purpose of responding to set objectives | 15 |
| Price | Score = $15 \times (1 - (\text{this bid} - \text{cheapest bid}) / (\text{most expensive bid} - \text{cheapest bid}))$ | 15 |
| Maximum possible score | | 100 |

11. Cost

The maximum number of working days for this consultancy is set at 15 working days, plus expenses.

12. Bid instructions

Bidders should submit the following:

- 1) A cover letter (max. one (1) page) outlining the motivation and qualifications to apply.
- 2) Summary table outlining how the bidder fulfils each of the assessment criteria
- 3) CVs of evaluator and potential team members
- 4) Evidence or sample of relevant security management policies
- 5) Samples of previous works
 - a. Evidence or sample of works related to Ukrainian context and/or small grant schemes
 - b. Any other relevant sample of works
- 6) A short (no more than two (2) page) conceptual framework with the proposed methodology, including limitations and ethical considerations
- 7) A succinct workplan for the assignment
- 8) A financial proposal with a detailed breakdown of costs (in Swiss Francs) for the overall assignment. This should include:
 - a. The daily cost and number of days by task/expert
 - b. The costs of per diems by location per day
 - c. All other costs for the evaluation (the team will be responsible for organising their own transport, accommodation and security management)

13. Submission of offers

Bids should be submitted by 23h59 (Geneva time) on the 31.05.2026 to: jobs@swiss-solidarity.org with the subject "Evaluation of Small Grant Schemes".

